Evaluator Tutorial

Tutorial for Proposal Evaluators

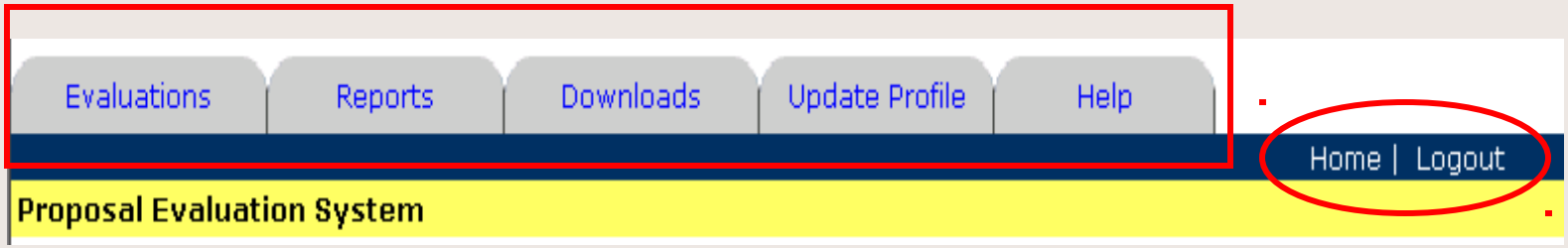
Version 2.0

Overview

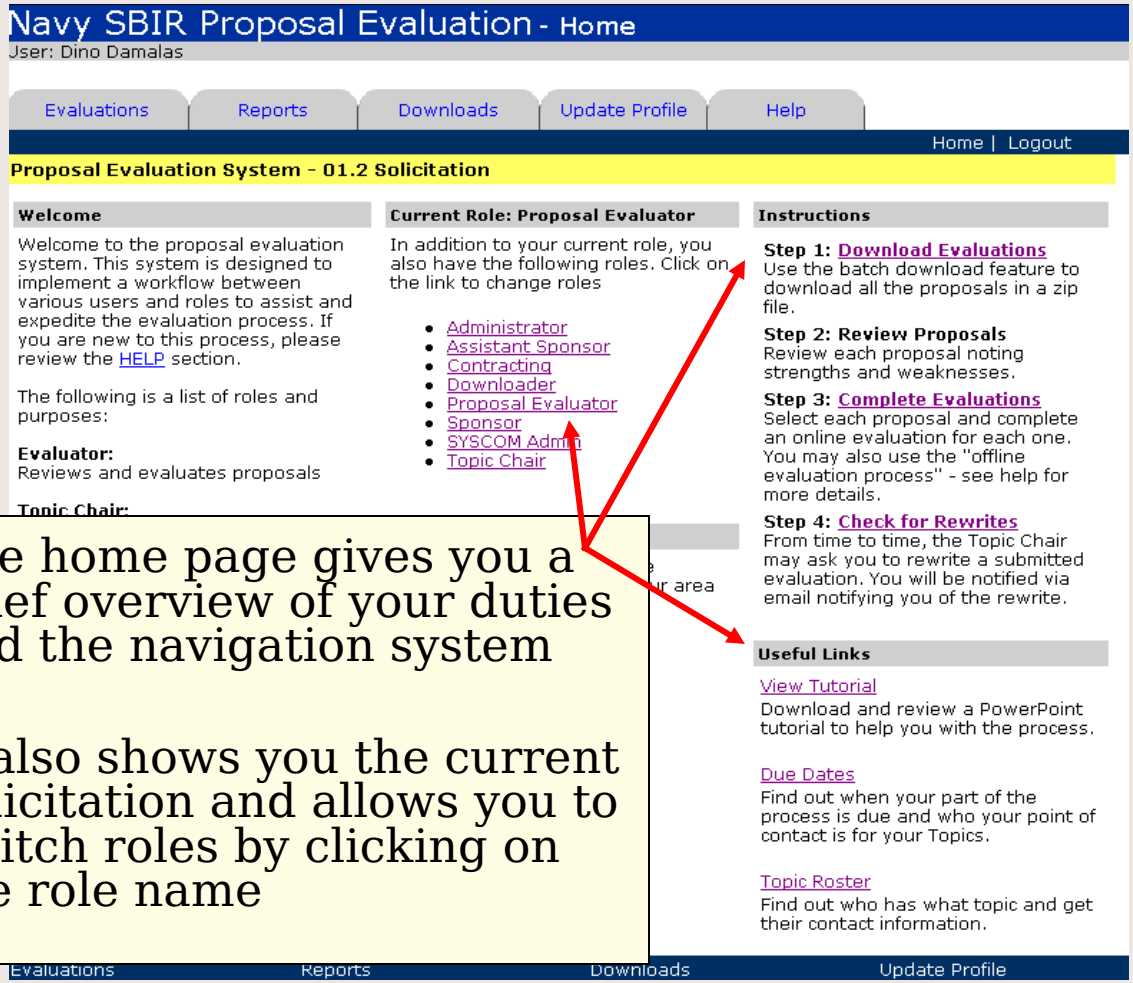
- As an evaluator, you have one primary role which is to review and evaluate proposals
- You will have access to only those proposals which you have been selected to evaluate.

Navigation

- Navigation through the site is done using the tab bar located at the top of the page.
- Under the Evaluations tab is where you will find all the proposals requiring evaluations.
- Reports shows various reports related to your proposals.
- Downloads allows you to batch download proposals
- Update Profile is where you may edit your contact information or change roles.
- Help is where you can find assistance with the site.

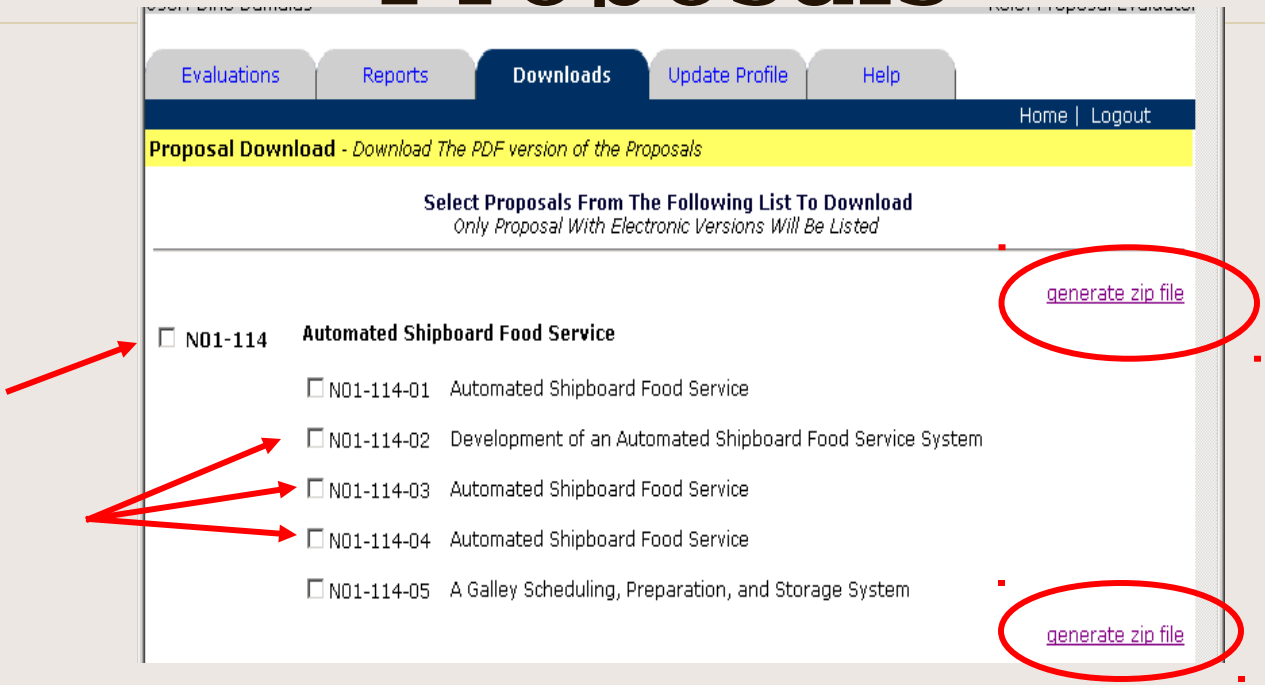


Home Page


Navy SBIR Proposal Evaluation - Home
User: Dino Damalas
Evaluations
Reports
Downloads
Update Profile
Help
Home | Logout
Proposal Evaluation System - 01.2 Solicitation
Welcome
Welcome to the proposal evaluation system. This system is designed to implement a workflow between various users and roles to assist and expedite the evaluation process. If you are new to this process, please review the HELP section.
The following is a list of roles and purposes:
Evaluator:
Reviews and evaluates proposals
Topic Chair:
Current Role: Proposal Evaluator
In addition to your current role, you also have the following roles. Click on the link to change roles
Administrator
Assistant Sponsor
Contracting
Downloader
Proposal Evaluator
Sponsor
SYSCOM Admin
Topic Chair
Instructions
Step 1: Download Evaluations
Use the batch download feature to download all the proposals in a zip file.
Step 2: Review Proposals
Review each proposal noting strengths and weaknesses.
Step 3: Complete Evaluations
Select each proposal and complete an online evaluation for each one. You may also use the "offline evaluation process" - see help for more details.
Step 4: Check for Rewrites
From time to time, the Topic Chair may ask you to rewrite a submitted evaluation. You will be notified via email notifying you of the rewrite.
Useful Links
View Tutorial
Download and review a PowerPoint tutorial to help you with the process.
Due Dates
Find out when your part of the process is due and who your point of contact is for your Topics.
Topic Roster
Find out who has what topic and get their contact information.
Evaluations
Reports
Downloads
Update Profile

- The home page gives you a brief overview of your duties and the navigation system
- It also shows you the current solicitation and allows you to switch roles by clicking on the role name

Batch Downloading of Proposals

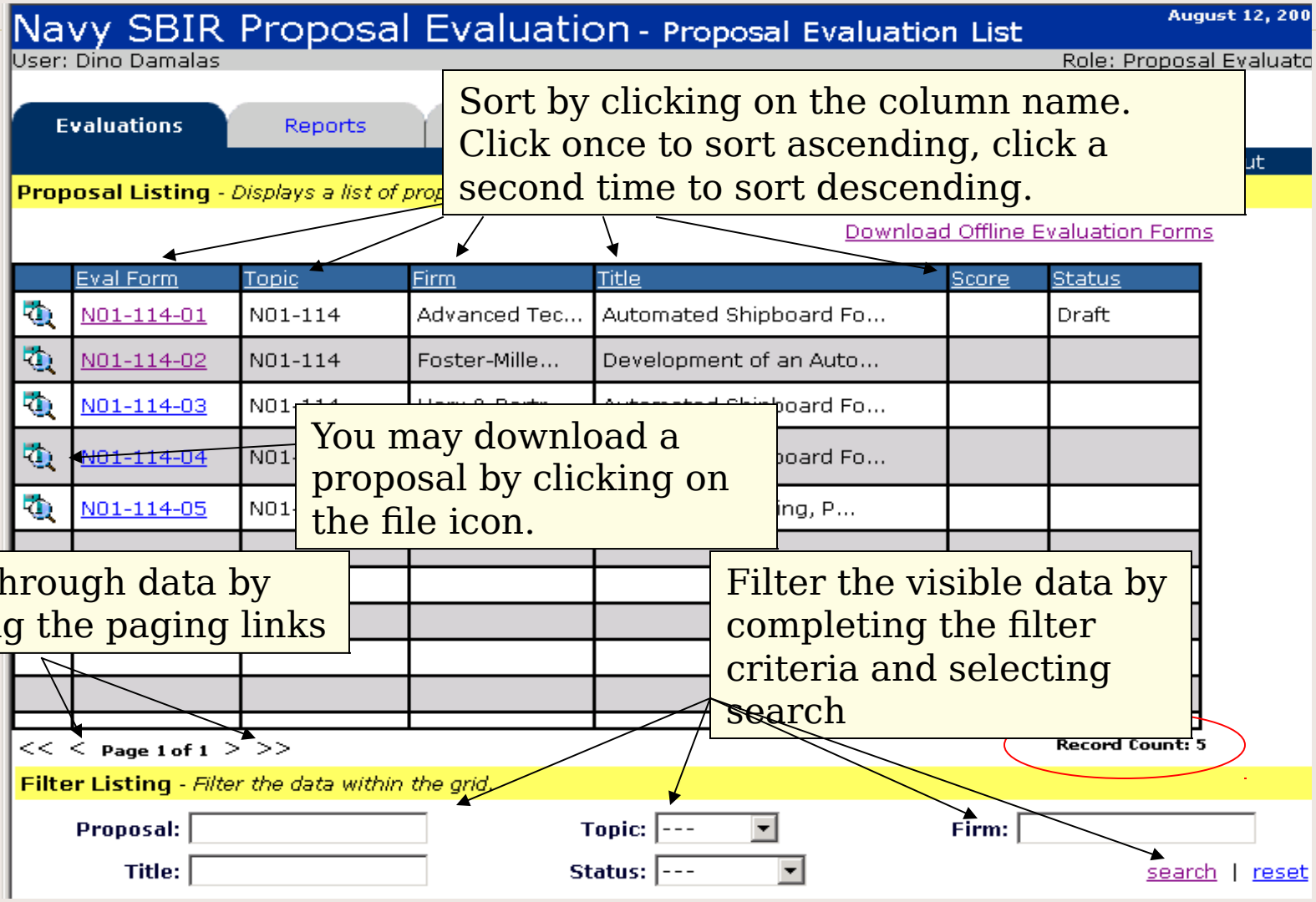

Evaluations
Reports
Downloads
Update Profile
Help
Home | Logout
Proposal Download - Download The PDF version of the Proposals
Select Proposals From The Following List To Download
Only Proposal With Electronic Versions Will Be Listed
generate zip file
N01-114 Automated Shipboard Food Service
N01-114-01 Automated Shipboard Food Service
N01-114-02 Development of an Automated Shipboard Food Service System
N01-114-03 Automated Shipboard Food Service
N01-114-04 Automated Shipboard Food Service
N01-114-05 A Galley Scheduling, Preparation, and Storage System
generate zip file

- Batch downloads allow you to download all your proposals in PDF format in a single file.
- To use this feature, click on the "**Downloads**" tab on the navigation bar.
- Next, check off all of the proposals you wish to download. You may automatically check all of the proposals in a topic by clicking on the check box located next to the Topic Number.
- Once you have selected the proposals, click on "**Generate Zip File**" to download all of your proposals in a compressed file call a zip file.

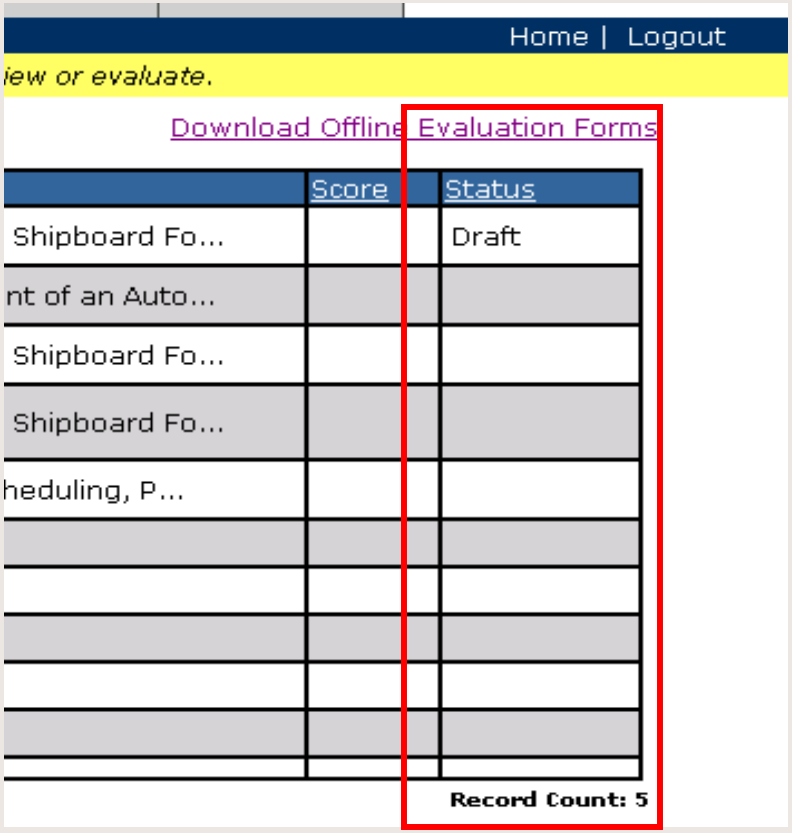
Proposal Listing

- To begin, click on the Evaluations tab located on the navigation bar.
- The evaluation listing page shows all the proposals to be evaluated and their status.
- The data grid shows 10 records at a time and allows you to page through the list.
- The data grid has advanced features like sorting by column and filtering
- To view or edit an evaluation, simply click on the associated hyperlink of the proposal you wish to edit or view.

Proposal Listing (cont'd)



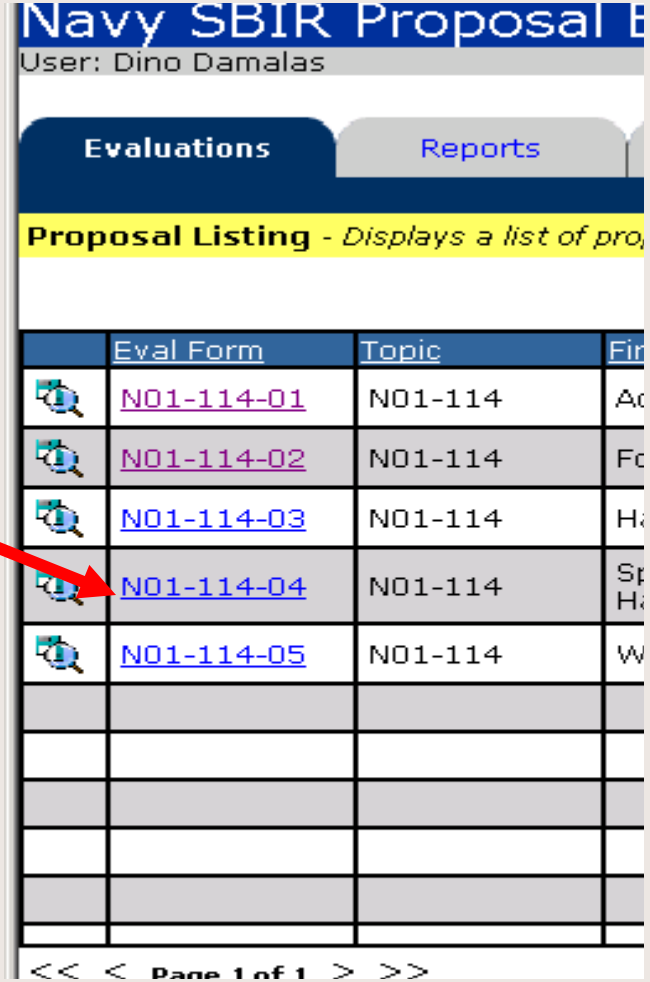
Proposal Listing (cont'd)



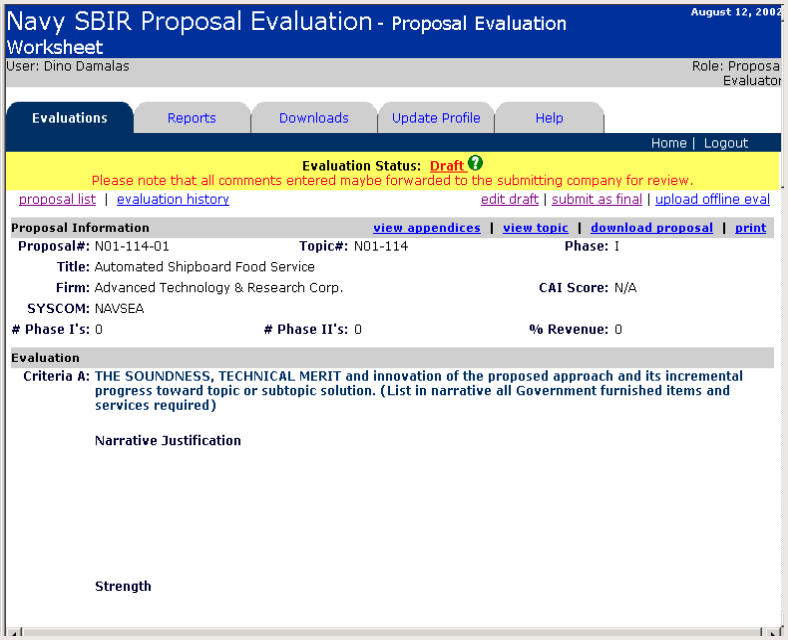
- All evaluations with a status of Draft, Rewrite, or with no status can be edited.
- Those with Accepted, Submitted, or Rejected can no longer be edited
- You are not done until all your proposals have been accepted by the topic chair

Getting To The Evaluation Form

- To perform or edit an evaluation, click on the proposal number link from the data grid.
- This action will take you to the evaluation form.

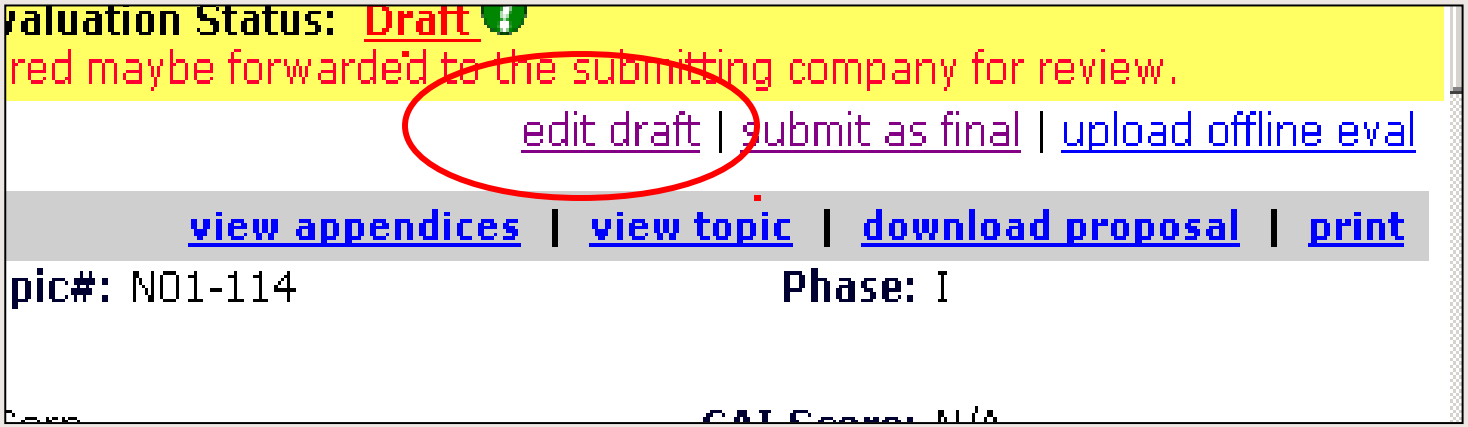


The Evaluation Form


Navy SBIR Proposal Evaluation - Proposal Evaluation Worksheet
August 12, 2002
User: Dino Damalas
Role: Proposa Evaluator
Evaluations
Reports
Downloads
Update Profile
Help
Home | Logout
Evaluation Status: Draft
Please note that all comments entered maybe forwarded to the submitting company for review.
proposal list | evaluation history
edit draft | submit as final | upload offline eval
Proposal Information
view appendices | view topic | download proposal | print
Proposal#: N01-114-01
Topic#: N01-114
Phase: I
Title: Automated Shipboard Food Service
Firm: Advanced Technology & Research Corp.
CAI Score: N/A
SYSCOM: NAVSEA
Phase I's: 0
Phase II's: 0
% Revenue: 0
Evaluation
Criteria A: THE SOUNDNESS, TECHNICAL MERIT and innovation of the proposed approach and its incremental progress toward topic or subtopic solution. (List in narrative all Government furnished items and services required)
Narrative Justification
Strength

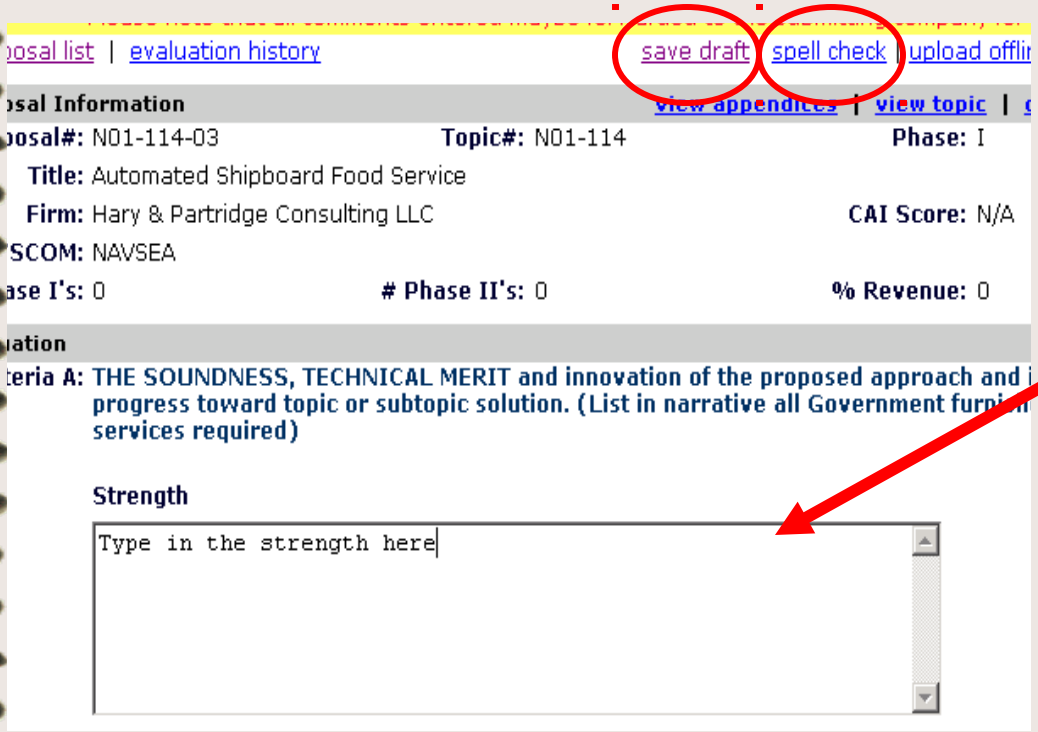
- The evaluation form is where you will complete your evaluation of the proposal.
- You will also find supplemental links on this form to get more information about the proposal, the topic, and historical actions taken upon this specific evaluation

Editing the Evaluation Form


valuation Status: Draft
red maybe forwarded to the submitting company for review.
edit draft | submit as final | upload offline eval
view appendices | view topic | download proposal | print
pic#: NO1-114
Phase: I

- In the right hand corner of the form, you will find the action links that will enable the editing of the form.
- If this is your first time of the form, the form will display text boxes in which you can begin typing.
- If you are working on a previously saved evaluation, you must click on the "**edit**" link to begin editing.
- Note that you can continue to work on and edit your evaluation up until your submit the evaluation to the Topic Chair. To submit it, click on "**Submit As Final**"

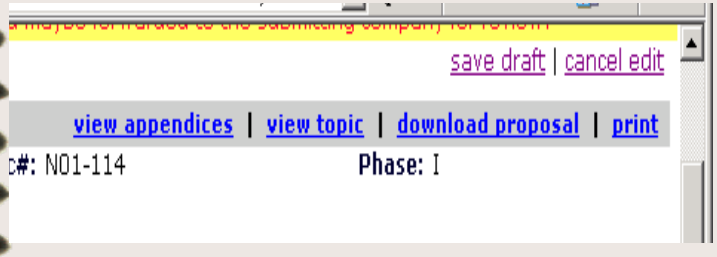
Completing the Form



- Once in edit mode, you will have text boxes in which you can enter your comments.
- All text boxes are required when submitting as final.
- You may incremental save your information without completing all the fields by clicking on "**Save Draft**"
- Additionally, you can spell check your comments by clicking on the "**spell check**" link.

Please note that the spell check features is a java applet. This may cause a delay in opening up the first evaluation form. Subsequent forms should not have the same delay.

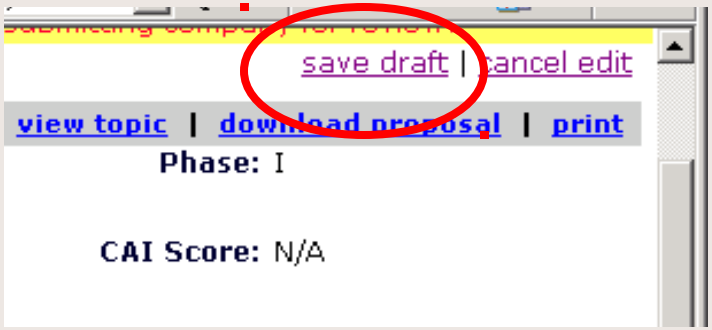
Additional Features

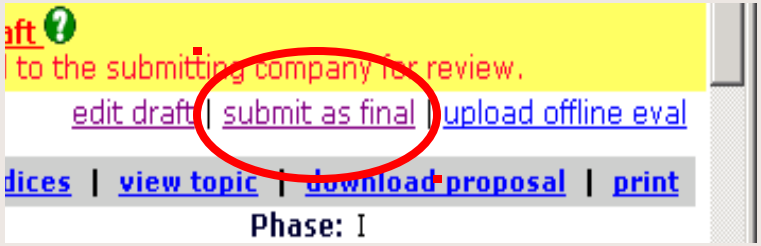


- Upper Right Hand Corner
  - **View Appendices** displays appendix a & b information for this proposal
  - **View Topic** displays topic information for this proposal
  - **Download Proposal** allows you to download the entire proposal in PDF format
  - **Print** allows you to print the proposal

- Upper Left Hand Corner
  - **Proposal List** returns you to the proposal listing
  - **Evaluation History** displays all actions taken upon this evaluation and maybe used to make official comments about the evaluation

Submitting The Evaluation




to the submitting company for review.
edit draft | submit as final | upload offline eval
dices | view topic | download proposal | print
Phase: I

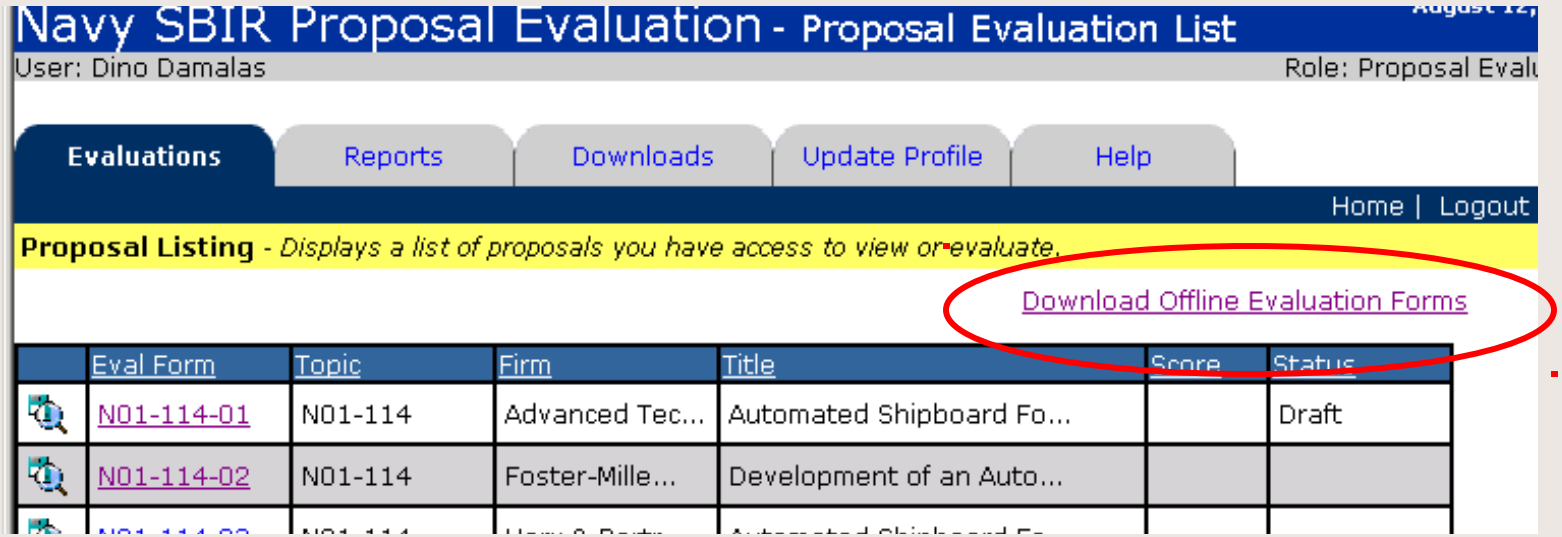
- Once you have completed the form and are ready to submit, click on the "**Save Draft**" link to save your changes.
- After you have saved your changes, click on the "**Submit as Final**" link to forward you evaluation to the Topic Chair
- Submitting as final will cause force validation to check to see that all the appropriate fields are completed and a box asking you to confirm and sign the evaluation will appear.

Offline Evaluations

- If you choose, you may complete some or all of your evaluations offline.
- How it works
  - Download a Word document with form fields.
  - Complete the Word document form.
  - Upload the Word document to the specified Proposal.
  - Information is then transferred to the online form
  - Review the online data and submit as final.

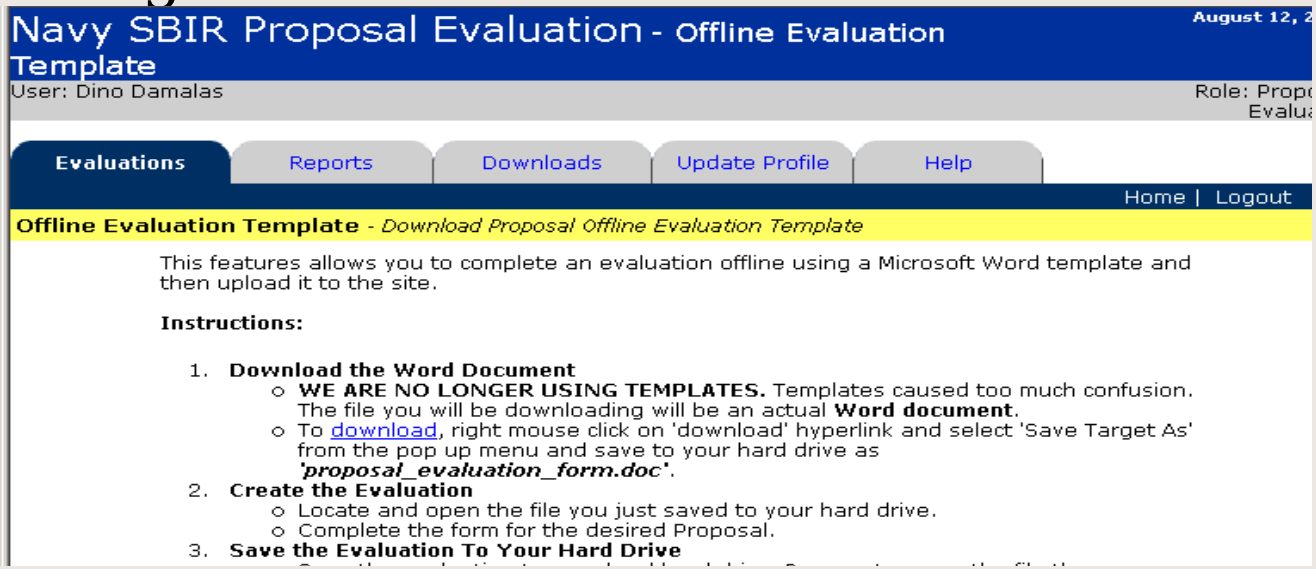
Getting the Offline Form

- You can get the Word document from the Evaluations tab.
- Click on the “Download Offline Evaluation Form” link located above the data grid. This will take you to the instruction page.

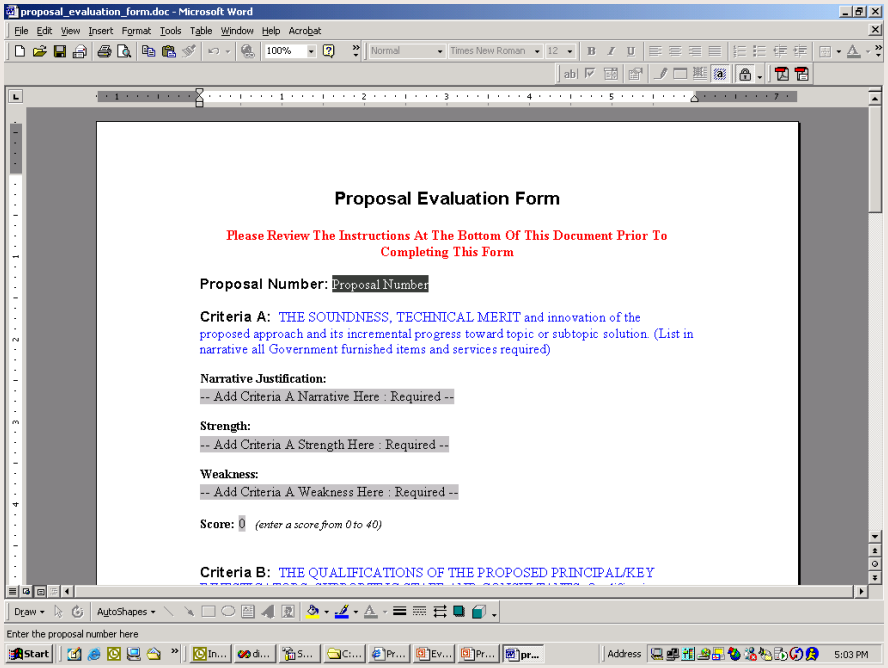


Offline Evaluation Instructions Page

- Read the instructions for downloading the form.
- Right click on the download link and select “Save Target As”. This will allow you to download the form to your hard drive without opening the document.


Navy SBIR Proposal Evaluation - Offline Evaluation Template
August 12, 2
User: Dino Damalas
Role: Propo
Evalua
Evaluations
Reports
Downloads
Update Profile
Help
Home | Logout
Offline Evaluation Template - Download Proposal Offline Evaluation Template
This features allows you to complete an evaluation offline using a Microsoft Word template and then upload it to the site.
Instructions:
1. Download the Word Document
WE ARE NO LONGER USING TEMPLATES. Templates caused too much confusion. The file you will be downloading will be an actual Word document.
To download, right mouse click on 'download' hyperlink and select 'Save Target As' from the pop up menu and save to your hard drive as 'proposal_evaluation_form.doc'.
2. Create the Evaluation
Locate and open the file you just saved to your hard drive.
Complete the form for the desired Proposal.
3. Save the Evaluation To Your Hard Drive

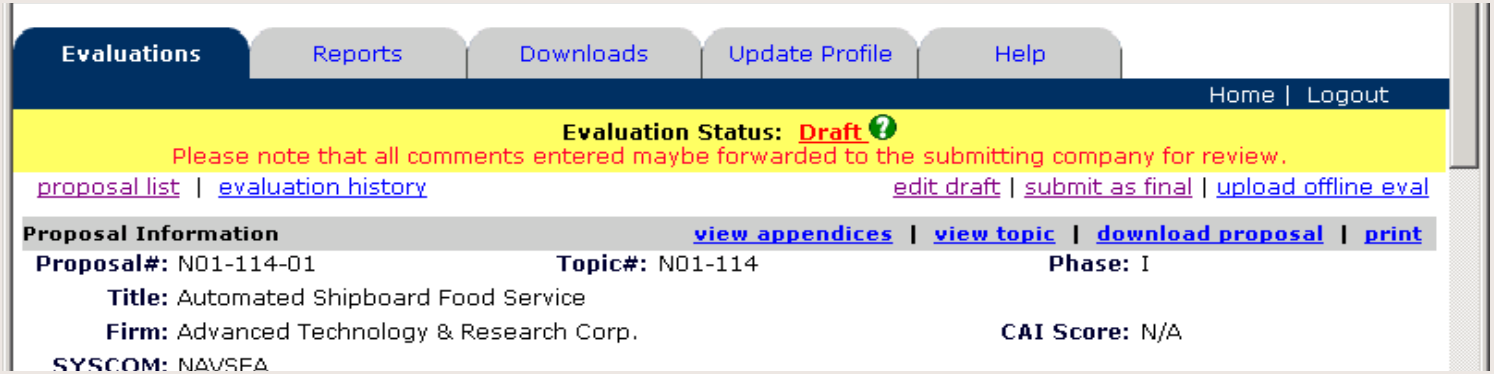
Completing Offline Form


proposal_evaluation_form.doc - Microsoft Word
Proposal Evaluation Form
Please Review The Instructions At The Bottom Of This Document Prior To Completing This Form
Proposal Number: Proposal Number
Criteria A: THE SOUNDNESS, TECHNICAL MERIT and innovation of the proposed approach and its incremental progress toward topic or subtopic solution. (List in narrative all Government furnished items and services required)
Narrative Justification:
-- Add Criteria A Narrative Here : Required --
Strength:
-- Add Criteria A Strength Here : Required --
Weakness:
-- Add Criteria A Weakness Here : Required --
Score: 0 (enter a score from 0 to 40)
Criteria B: THE QUALIFICATIONS OF THE PROPOSED PRINCIPAL/KEY
Enter the proposal number here

- Once the form is downloaded, complete the form and save it to your computer.
- To avoid confusion, you should use the proposal number as the document's name when you save it.
- Please note that you must complete one Word document per evaluation.

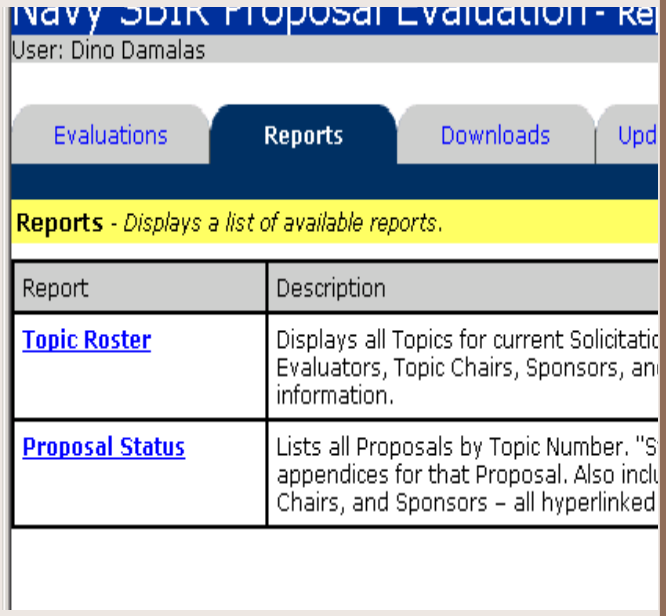
Uploading The Offline Evaluation

- To upload the form, go back online and go to the **Evaluations** tab.
- Click on the proposal number to get to the online evaluation form.
- At the top right hand corner of the form will be a link labeled "**upload offline eval**".
- Clicking on that link will take you to the upload page.
- On the upload page, click on "**Browse**" and select the document from your local hard drive.
- After the document is selected, click on the "**Upload**" button to begin the transfer.
- Once uploaded, the information will be scraped off of the Word document and transferred to the online form.
- After the information is transferred, complete the evaluation by either editing it or submitting it as final.

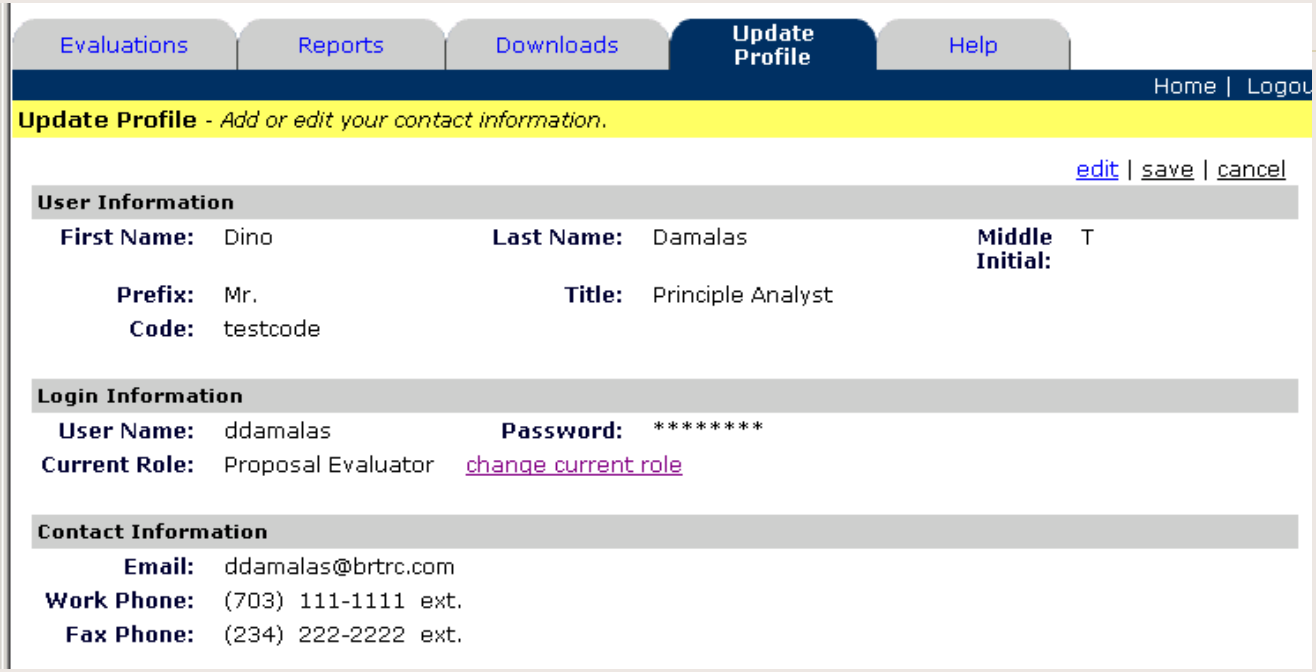


Reports

- Reports are provided to assist you in keeping track of what is going on with your proposals and evaluations.
- Reports are specific to your evaluations
- Reports may vary depending on your role.
- To access reports, click on the "**Reports**" tab located on the navigation bar.



Update Profile



- The update profile feature allows you to edit your contact information or change your password as needed.
- If you have multiple roles, you may use this page to switch between your roles.
- To access, click on the "**Update Profile**" tab located on the navigation bar.

Getting Help

- To get help or review tutorials, click on the “Help” tab located in the navigation bar.
- Here you will find FAQs, videos, and descriptions of the pages to assist you.

Additional Notes

- **Rewrites**
  - After you have submitted your evaluation, there maybe times in which the topic chair may ask you to rewrite your evaluation.
  - When a rewrite occurs, the status of your evaluation will change to “Rewrite” and you will be allowed to edit your evaluation.
  - If a rewrite does occur, you will be notified via email with the Chair’s comments. You may also lookup the chair’s comments in the “Evaluation History” feature.

- **NonConcurs**
  - If a Chair has asked you to rewrite your evaluation and you feel adamant about your existing evaluation, you may choose to mark the evaluation as “***NonConcur***”.
  - A ***NonConcur*** signifies that you are not willing to change your evaluation and the Sponsor and the Topic Chair will be notified via email.
  - Please use this feature only as a last resort when communication between you and the topic chair has broken down.
  - The “***NonConcur***” option will show up on the form next to the “Save Draft” hyperlink only if the evaluation has been marked as “Rewrite”. If you choose this option, you will be force to justify why you have chosen to mark this evaluation as nonconcur.

Frequently Asked Questions

- **“When downloading a specific proposal, I get multiple files for the same proposal or an additional zip file.”**
  - This is because the firm that submitted the proposal protected their PDF from alteration. During the setup process, we download all the evaluations from the DoD site and merge them with the CCR, A&B, and Cost Proposal. We cannot merge the documents if the Firm has protected their technical evaluation, so we zip all the files together an present them as one download.
- **“The proposal I downloaded is not legible or the graphics don’t display correctly.”**
  - Sometimes during the conversion process, some sections of the document get distorted. To get a copy of the original file, please contact Lore-Anne Ponirakis (703-205-1589) or Dino Damalas (703-253-0932).
- **“After saving the evaluation, I do not see the changes I have made.”**
  - Sometimes your browser will cache the page. Simply hitting refresh or reload should get a new copy of the page.
- **“When I click on an evaluation form for a particular proposal, the form takes forever to load.”**
  - The new spell check features is implemented using a java applet. The first time you come to the evaluation form, the applet will load. This may take a few minutes. After that, subsequent evaluation forms will display quicker because the applet has already been loaded to your browser.

Additional Assistance

- For procedural questions such as due dates and responsibilities, please contact your Topic Chair or Sponsor.

- For technical assistance, please contact:
  - Lore-Anne Ponirakis at poniraks@brtrc.com
  - Dino Damalas at ddamalas@brtrc.com